

### **SAP Business Warehouse/Business Intelligence Reporting**

# BW/BI Report Context Menu

Washington State HRMS Business
Warehouse/Business Intelligence (BW/BI)
Self-Paced Learning Materials
General Topics - BW/BI End Users/Power Users

## BW/BI Report Context Menu - Overview

The BW/BI Report Context Menu section provides an overview of context menu functions available for BW/BI Custom Reports.

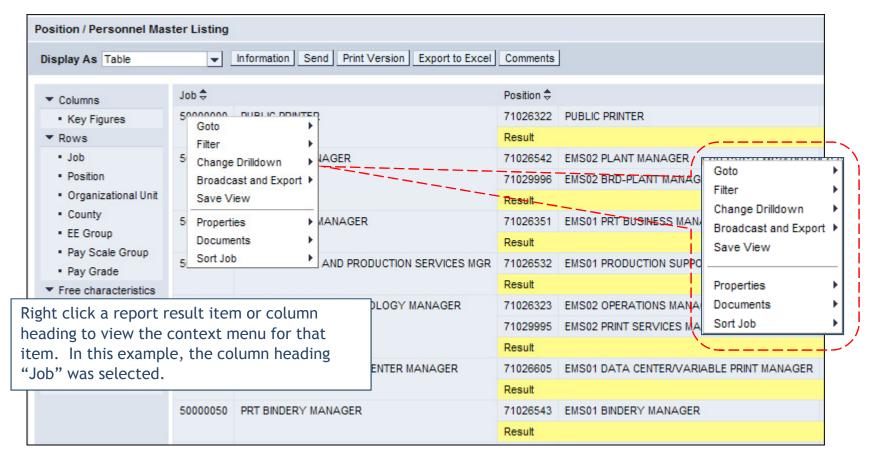
#### Topics covered in this section include:

- BW/BI Report Context Menu
- Back
- > Goto
- > Filter
- Settings
- Change Drilldown
- Bookmark
- Properties
- Sort



## BW/BI Report Context Menu

The BW/BI Report Context Menu provides the user with the ability to perform various analysis such as setting filters, restrictions, exceptions, sorting, etc. The context menu can be accessed by clicking on a report item such as a key figure or characteristic. Context menu options vary depending on the report item selected.



# BW/BI Report Context Menu

The table below describes the Context Menu options in more detail. Context Menu options vary depending on the report item selected (for example, Hierarchies, Characteristics or Key Figures).

Back One Navigation Step	Choose Back to undo a navigational step in a report such as filtering on a specific value.
Back to Start	Choose Back to Start to undo all navigational steps in a report.
Keep Filter Value	Choose Keep Filter Value to see only the data for a characteristic value. The characteristic value itself is removed from the drilldown.
Select Filter Value	Choose Select Filter Value to filter report results according to a value that is selected from a list of values.
Change Drilldown/Remove Drilldown	Choose Remove Drilldown to remove a characteristic from the drilldown.
Sort Job	Choose Sort Job to sort structural component values in ascending or descending order.
Goto	Choose Goto to access sub reports from a main report.
Broadcast and Export/Bookmark	Choose Bookmark to save report settings once user defined settings have been applied.
Change Drilldown/Swap	Choose Swap With to swap a characteristic with another characteristic.
Swap Axes	Choose Swap Axes to swap the axes of the report results. This action will swap the Key Figures to display in rows and the Characteristics to display in columns.
*Broadcast and Export/CSV	Choose Export to CSV to export the report to a Comma Separated Values file (.csv)
Properties	Choose Properties to change settings for a characteristic or key figure.
Filter/Variable Screen	Choose Variable Screen to display the report variables.

<sup>\*</sup> Exporting topics are covered in a separate section

## Back / Back to Start

▼ Information | Send | Print Version | Export to Excel | Comments

Female

Personnel Area ≙

1110 Dept of Personnel

1111 Information Services Division

Ethnic Origin \$

10/Not assigned

▼ Information | Send | Print Version | Export to Excel | Comments

Ethnic Origin 🖨

10/Not assigned

Asian or Pacific Islander Black/Not Hispanic origin

White/Not Hispanic origin

10/Not assigned

American Indian/Alaskan

Asian or Pacific Islander

The Back One Navigation Step / Back to Start context menu items allow the user to undo navigational steps (drilldowns, filters, etc.) that have been applied to report results.

The example below shows the report with the Gender column removed to show how to use the Back context menu item to return Gender to the report results.

Display As Table

Key Figures

Gender

Personnel Area

. Ethnic Origin

Free characteristics
 Organization

Personnel Area #

**Minority Distribution** 

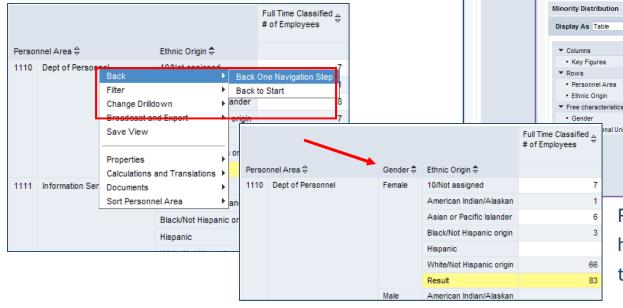
1110 Dept of Personnel

▼ Columns

To use the Back command and undo a navigational step:

1. From the report results, click any item in the report results to open the context menu.

2. Click Back One Navigation Step.



Result: The Gender column has been added back into the report results.

Full Time Classified 🛆

Full Time Classified 🛆

# of Employees

# of Employees

## Back / Back to Start

In this example, the a report is displayed with several fields removed from the report results.

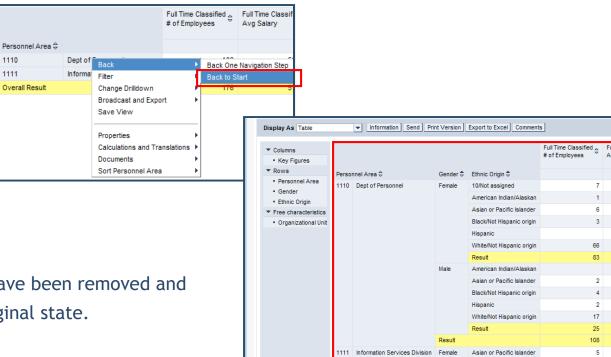
To undo several navigational steps and return the report to its original state:



Report with fields removed

- 1. From the report results, click any item to open the context menu.
- 2. Click Back to Start.

Result: All navigational steps have been removed and the report is returned to its original state.



Report restored to original state

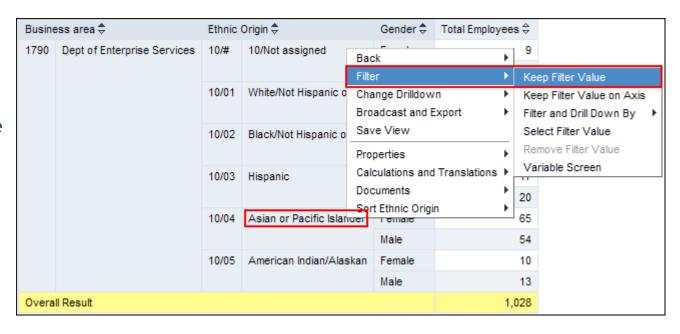
## Keep Filter Value

The Keep Filter Value context menu item allows the user to view report results for a specific value in the results.

The example below show how to use the Keep Filter Value option to filter a report to include only those records where Ethnic Origin is "Asian/PI".

#### To use Keep Filter Value:

- 1. From the report results, right click the "Asian or Pacific Islander" value in the Ethnic Origin column to open the context menu.
- 2. Select Keep Filter Value.



## Keep Filter Value

#### Result: Results will display Asian/PI Ethnic groups only.

Business area ♣		Ethnic Origin 🕏		Gender 🕏	Total Employees ⇔
1790	Dept of Enterprise Services	10/#	10/Not assigned	Female	9
				Male	6
		10/01	White/Not Hispanic origin	Female	330
				Male	477
		10/02 Black/	Black/Not Hispanic origin	Female	11
				Male	16
		10/03 Hispanic	Hispanic	Female	17
				Male	20
		10/04 Asian	Asian or Pacific Islander	Female	65
				Male	54
		10/05	American Indian/Alaskan	Female	10
				Male	13
Overall Result			1,028		

**Results Before Filter** 

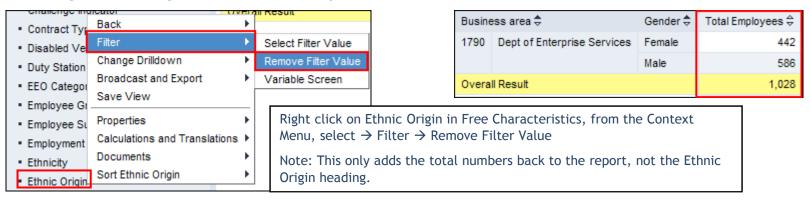
Business area ♣		Gender 🕏	Total Employees ⇔
1790	Dept of Enterprise Services	Female	65
		Male	54
Overall Result			119

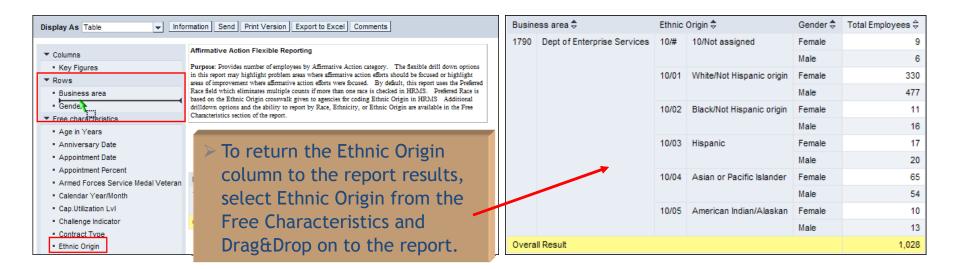
Results After Filter: Display only Asian/PI counts

The Ethnic Origin column is removed from the report results. The numbers for Ethnic Origin are displayed.

## Keep Filter Value

#### Adding Ethnic Origin back into the report results:





If necessary, you can click any column header and select Back to Start from the context menu to return the report to its original state.

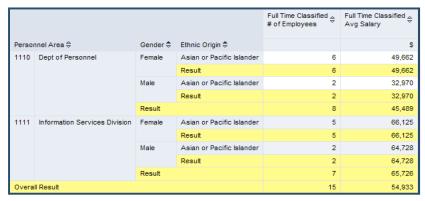
### Select Filter Value

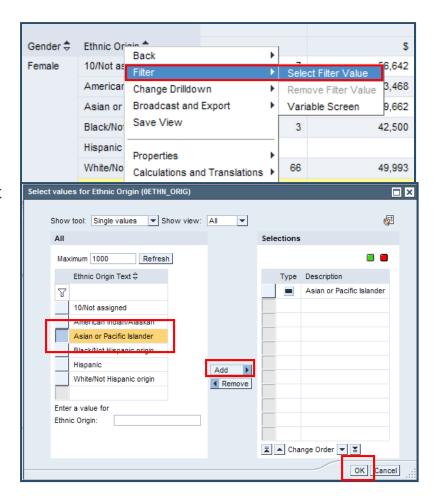
The Select Filter Value context menu item allows the user to select a filter from a list of filter options. The example below shows how to use Select Filter Value to filter for a specific Ethnic Origin

#### To use Select Filter Value:

- 1. From the report results, click the column header to filter by (this example uses Ethnic Origin).
- 2. Click Select Filter Value from the context menu.
- 3. From the Select Filter Value screen, Asian or Pacific Islander.
- Click Add and OK.

Result: Results will display Ethnic Origins identified as Asian or Pacific Islander only and keep the header in the report results.





#### Remove Drilldown

The Remove Drilldown context menu item allows the user to remove a characteristic from the report results.

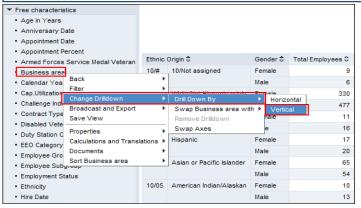
The example below shows how to remove the drilldown on Business Area.

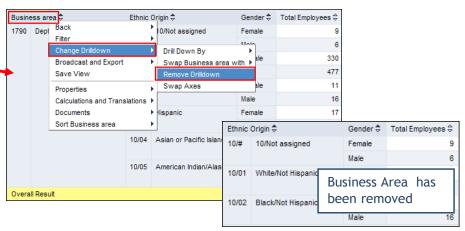
To remove the drilldown:

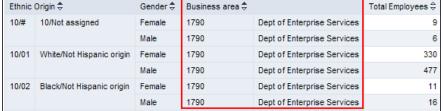
- 1. From the report results, click the Business Area column to open the context menu.
- 2. Select Change Drilldown/Remove Drilldown.

To add it back: right click Business Area in the Free Characteristic and select Change Drilldown/Drilldown by: Horizontal (Columns) or Vertical (Rows).

(Note: it will be placed at end of the section and you will need to manually change it if you want it in a different sequence).





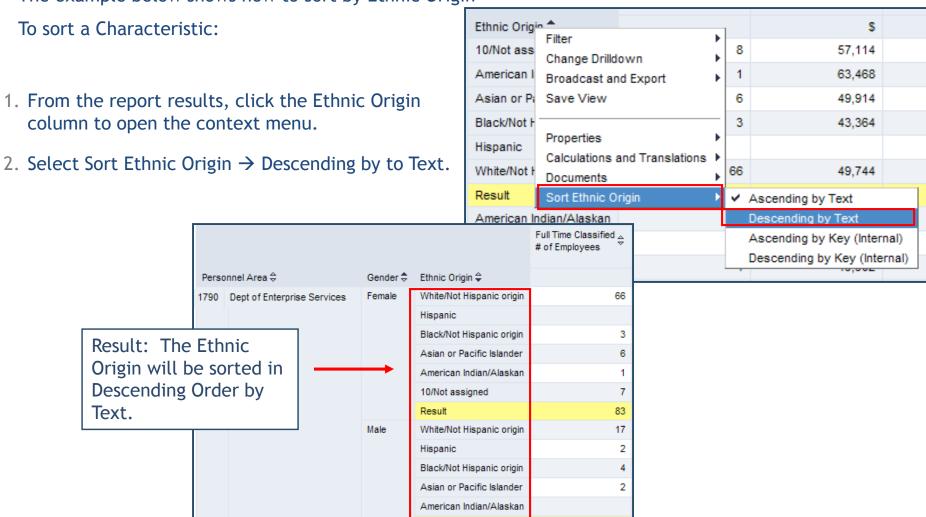




#### Sort

The Sort context menu item allows the user to sort report items in ascending or descending order.

The example below shows how to sort by Ethnic Origin



#### Goto

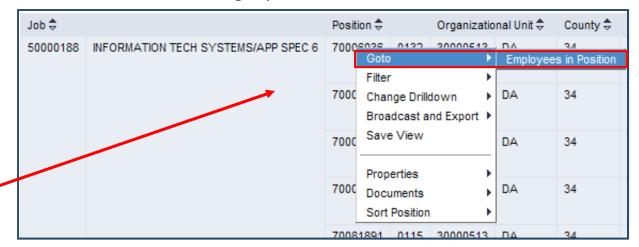
Some BW/BI Custom Reports contain sub reports that are accessible from the main report. The Goto Command allows the user to access sub reports from the context menu.

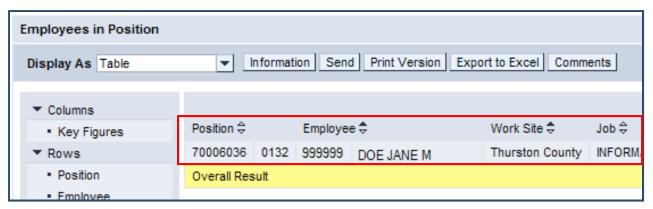
The example below uses the Position/Personnel Master Listing report to describe how to use the Goto

command to run a sub report

To use the Goto command:

- 1. From the report results, click an Position to open the context menu.
- Click Goto → Employees in Position.





Result: Display the employee for the selected position.

### Goto

The table below contains a list of BW/BI Custom Reports that provide Goto sub reports.

Report Name	Goto Report
Employee History (see example on previous page) ZZPA_M03_Q431	<ul> <li>Employee Education Record</li> <li>Employee History Part 2</li> </ul>
Appointment Status Changes ZZPA_M03_Q494	> Appointment Status Changes - Prior Month Status
Position - Personnel Master Listing ZZPAOS_C01_Q499	➤ Employees in Position  Note: Employees in Position drills down to Employee Actions (see below)
Employees In Position Sub-Report (Sub-Report of Position - Personnel Master Listing) ZZPA_M03_Q499C	> Employee Actions
Employee Roster ZZPA_M03_Q231A	<ul> <li>Gender/Ethnic_Origin/Disability/Military/Veteran by Employee</li> <li>Cost Distribution by Employee</li> </ul>
Position Statistics Report ZZPAOS_M03_Q516	> Position Statistics - Position Fill Count

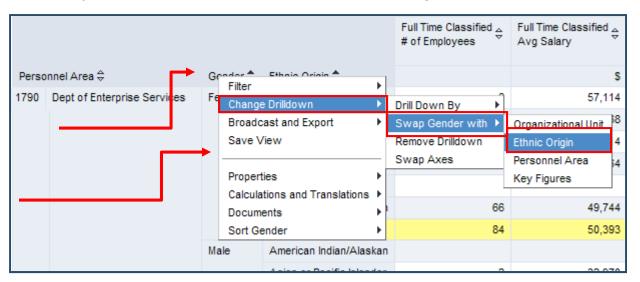
## **Swap Characteristics**

The Swap Characteristics context menu item allows the user to swap the location of one characteristic with another.

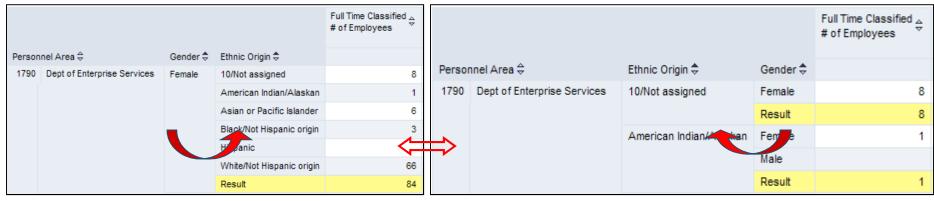
The example below report shows how to swap the Gender column with the Ethnic Origin column.

To Swap Characteristics:

- From the report results, click the column header to be swapped to open the context menu.
- 2. Click Swap Gender with → Ethnic Origin.



Result: Swap the Gender and Ethnic Origin columns.



Before Swap After Swap

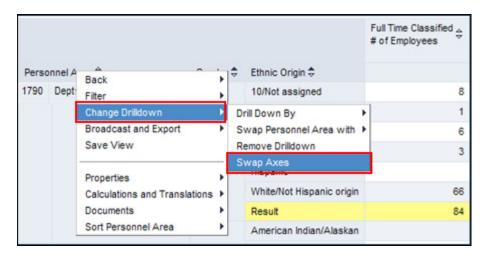
## **Swap Axes**

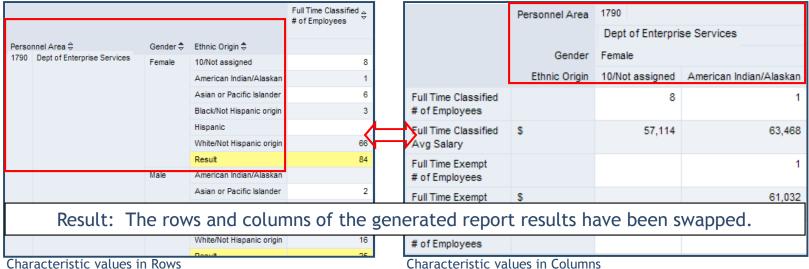
The Swap Axes context menu item allows the user to swap the columns and rows in the report results. For example, the user may want to view report characteristics in columns, rather than rows.

The example below shows how to swap report axes.

#### To swap report axes:

- 1. From the report results, right click any item to open the context menu.
- 2. Click Change Drilldown/Swap Axes.





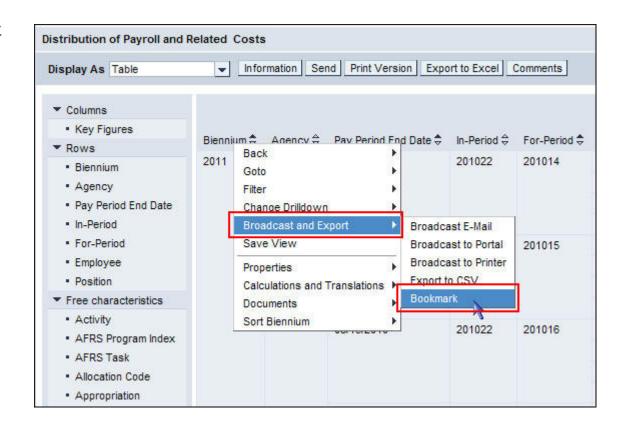
Section 8: General Topics / BW/BI Report Context Menu

The Bookmark context menu item allows the user to save their report modifications once they have applied filters, sorted columns or defined any other report settings. A Bookmarked report will also retain the variable values used to run the report.

In the following example, the Distribution of Payroll and Related Costs report was run with user defined settings.

To create a Bookmark to save report settings for future use:

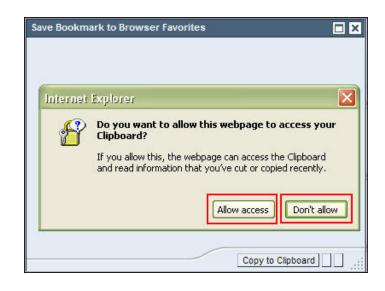
- 1. From the report results, click any item in the table to open the context menu.
- Select Broadcast and Export →Bookmark:



The "Save Bookmark to Browser Favorites" is displayed with a popup asking if you want to allow this webpage to access your Clipboard.

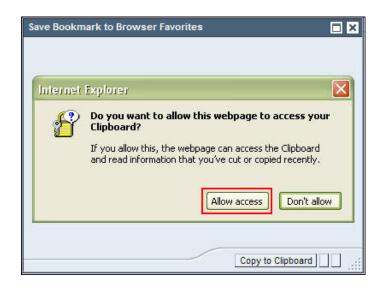
If you select "Don't allow", you get the "Save Bookmark to Browser Favorites" with the "Add to Favorites" option, but without the "Copy to Clipboard" option:

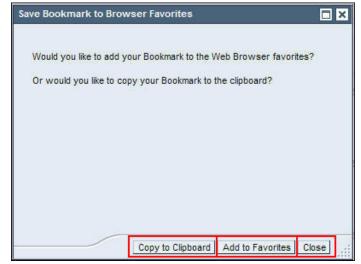






If you select "Allow access", you get the "Save Bookmark to Browser Favorites" with the "Add to Favorites" option and the "Copy to Clipboard" option:





To add the Bookmark to your Browser Favorites:

- Select "Allow access" or "Don't allow":
- 2. Select "Add to Favorites":





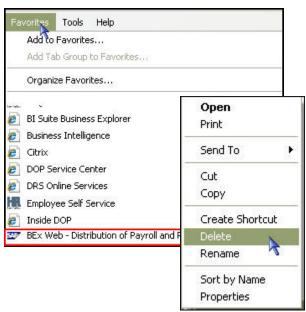
- 3. The "Add a Favorite" popup is displayed:
- 4. Click the "Add" button (you can change the name of the Favorite if needed):



- 1. The Bookmark personalized report has now been added to your Browser Favorites:
- To generate your Bookmark report, access your Favorites list → Select the Bookmark:

 To delete the Bookmark, access your Favorites → Bookmark → Right Click → Delete





This option copy's a link for the Bookmarked report to your Clipboard.

- 1. Select "Allow access":
- Select "Copy to Clipboard":

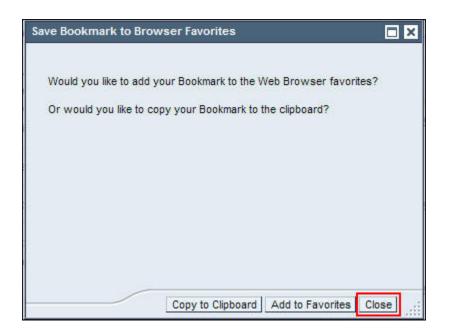
- "Do you want to allow...popup is displayed again. Select "Allow access":
- The Bookmark link is now copied to your Clipboard and ready to paste into a document or email.



#### **Bookmark Link:**

https://myhrms.wa.gov/irj/servlet/prt/portal/prtroot/pcd!3aportal\_content!2fcom.sap.pct!2fplatform\_add\_ons!2fcom.sap.ip.bi!2fi Views!2fcom.sap.ip.bi.bex?BOOKMARK=DEGH0JPT8R3ZF3FBACM7T81VQ

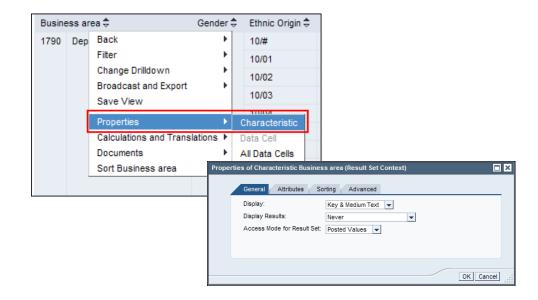
Once you have copied your Bookmark link to your Clipboard, select "Close" to exit the "Save Bookmark to Browser Favorites" popup.

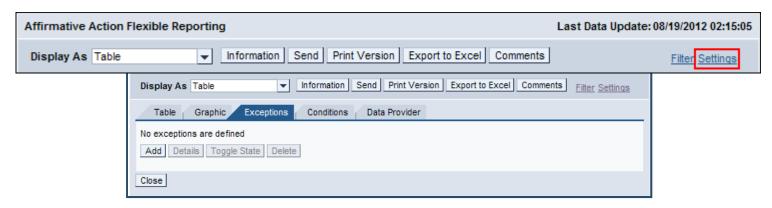


### **Report Properties**

Reports run from the HRMS Portal allow the user to set report properties in two ways:

- Properties Set properties such as
   Display and Sort for items such as
   Characteristics and Key Figures in the
   report results using the Context Menu.
- 2. Query Properties Set query properties such as location of results rows and how to display zero values in the report results using the "Settings" button on the report results.





## **Properties**

The Properties context menu item allows the user to change settings for report items such as Characteristics and Key Figures. For example, the user may want to display a Characteristic as Key and Text or sort a Key Figure value in Descending order. Property options vary depending on the report item selected.

#### Common Property settings include:

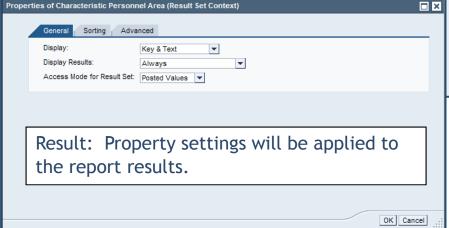
Display	Layout in which to present the characteristic. For example, display a Characteristic as Key and Text, Text Only or no Display.
Sort By	Sort Characteristic values. For example, sort by the Characteristic Key value or by the Characteristic Text value.
Sort Direction	Sort direction of Characteristics. For example, sort Characteristic value in Ascending or Descending order.
Suppress Results Rows	Determine whether the results rows of the Characteristic are suppressed. For example, always suppress the results rows, never suppress the results rows, or suppress results rows that have only one value.
Calculate Result as	The Key Figure's calculated result. For example, calculate results as a summation, as the maximum amount, as the minimum amount, as the average of all values or suppress the results altogether.
Calculate Direction	Format of the calculation. For example, calculate the results along the rows or calculate the results along the columns.
Calculate Single Value as	Calculation of single values. For example, count all values not equal to zero, average all values, calculate values as a ranked list, calculate the maximum value or calculate the minimum value.

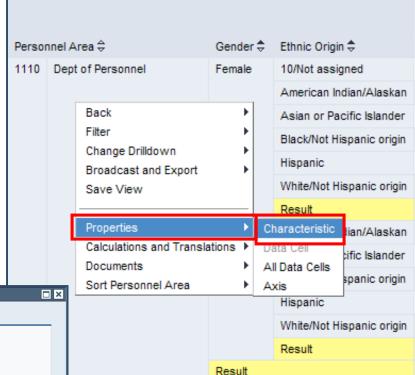
## **Properties**

The example below shows how to access the properties of Characteristics or Key Figures from the context menu.

#### To access Characteristic Properties:

- 1. From the report results, right click any characteristic to open the context menu.
- 2. Click Properties → Characteristic.
- 3. Change Property settings.
- 4. Click OK to assign the new property settings.





## **Query Settings**

The Query Settings allows the user to change settings for a query within a report. For example, the user may want to display report results at the top of the report results table, rather than the bottom or display zero values as an empty cell.

#### Common Query Settings include:

Display rows/columns hierarchically	Place characteristics that are split over several rows or columns in one row or column in a hierarchy by selecting "Display the columns [or rows] hierarchically" and specify the node to expand the hierarchy to.
Results Position	Specify the location of the report results. For example, display results at the bottom/right of the report results or display results at the top/right.
Display of +/- Signs	Specify how negative numbers are displayed. For example, display negative values as:  > -5 > 5- > (5)
Display of Zeros / Show Zeros as	Specify how zero values are displayed in the report results. For example, display zeros:  > With Currency/Unit: Zeroes are displayed with the currency/unit (for example, \$0.00). This is the default setting. > Without Currency/Unit: Zeroes are displayed without a currency or unit entry (for example, 0.00). > As Empty Cells: Cells containing a zero value remain empty. > Display Zeroes As: Use this setting in conjunction with the Show Zeroes As field to specify the character to use to display zeros (for example, an asterisk (*). All cells containing zeros will be populated with an asterisk (*)).
Suppress / Effect on	"Suppress" specifies whether columns or rows containing zeros are to be displayed. For example, suppress a column that results in zero. The following options are available for Suppress: No: All Rows or columns with zeroes are displayed. Active: Every row or column that has a result of zero is not displayed. For example, if the row or column contains the values 1, -1, 1, -1, the result is zero. The Active setting will suppress the entire row or column that results in zero. Active (all values = 0): Every row or column containing zero values in all cells will not be displayed. "Effect on" defines whether suppression of zero values should be applied to rows and columns, only to rows or only to columns.

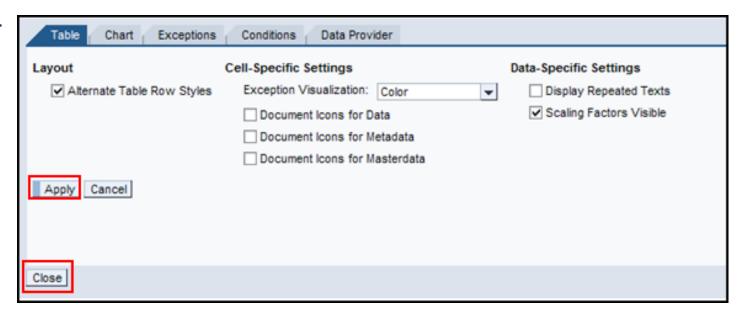
## **Query Settings**

The example below shows how to access the Query Settings.

1. From the report results, click the Settings button.



- 2. Query properties is displayed.
- 3. From the Local Settings of Query window, change the Query settings.
- 4. Click Apply.

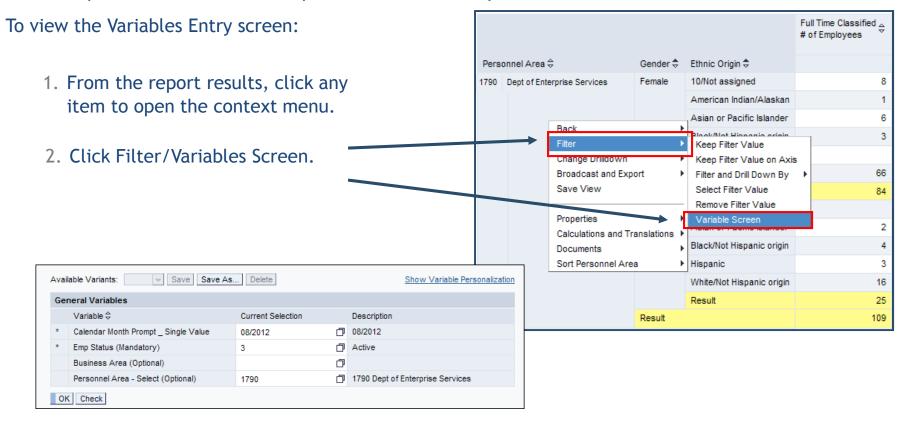


Result: Query Settings will be applied to the report results.

## Variables Entry

The Variables Entry context menu item allows the user to display the report selection criteria variables screen.

The example below shows how to open the Variables Entry screen.



Result: The Variables screen is displayed to allow the user to enter new or modify existing variables for the report.